

DEPARTMENT OF  
PUBLIC HEALTH AND HUMAN SERVICES



Brian Schweitzer  
GOVERNOR

Joan Miles  
DIRECTOR

STATE OF MONTANA

Developmental Disabilities Program

RECEIVED  
APR 17 2007  
DE. HHS-DSD

Date: April 5, 2007

To: Ellen Condon, Director Montana Works  
Timm Vogelsburg, Rural Institute

From: Sheri Pullium, Quality Improvement Specialist,  
Developmental Disabilities Program (DDP)

Subject: Quality Assurance Review FY '07

Please find attached the Quality Assurance Report for Montana Works. The review was completed in April 4, 2007 and covered the period February '06 through March '07.

It was a pleasure to meet Susanne and become familiar with Montana Works and the preparations being made to become Montana Work Solutions. It is apparent that Susanne has strong relationships within the Bitterroot community and is successful in collaboration efforts with local employers. It is also evident that priority is placed on the abilities and interests of the individuals she serves when supporting them in job searching and placement. See QAOS # 2.

During this review, items noted for improvement includes making the goals and objectives measurable and assuring that data being tracked matches the objective being worked on. There will be training available in '07 on Person Centered Planning that will include goal writing that will be beneficial. In addition to this training, Susanne plans to submit goals before the IP to her QIS for suggestions and assistance.

### Administrative

Ellen Condon was appointed as the Director in September 2005 for purposes of the collaboration between Montana Works and the University of Montana's Rural Institute. The organization will split from the Rural Institute as of July 1, 07 and become a State Qualified Provider independent from the Rural Institute. At that time the organization will become Montana Work Solutions and be a For- Profit employment agency.

## **Scope of Review**

Montana Works currently provides community employment services in the Bitterroot Valley to 4 individuals accessing DD funding. All services provided are funded through the Medicaid Home and Community Based Waiver. Montana Works has been contracting with the Developmental Disabilities Program (DDP) to provide vocational services since FY '03. Their total clientele has increased to a total of 29 people including the 4 individuals funded thru DD.

## **General Areas**

### **A. Administrative**

Montana Works was granted a three-year CARF accreditation in August 2005. While the DDP no longer requires national accreditation, the agency maintains CARF accreditation in order to access Vocational Rehabilitation (VR) funding. Montana Works does not operate group homes or other services that require Licensing by the Department of Public Health and Human Services.

Montana Works has 1 ½ more years under a grant for a Youth Corps Project funded with the Rural Institute. This was a three-year grant and is utilized to expand work experiences opportunities in the Bitterroot Valley. The staff are hopeful that it will lead to more students choosing Montana Works as their service provider when they leave the school system.

Montana Works is not required to participate in an A-133 audit as part of their contract. Staff maintain excellent documentation and progress notes in order to ensure accurate billing for services. There have been no issues noted in the area of invoices or the required Annual Expenditure Report (AER).

## **Specific Service Reviewed**

### **A. Residential**

N/A

### **B. Work / Day / Community Employment**

N/A

### **C. Community Supports**

## **Accomplishments**

Some highlights of the individual's employment include: One individual has found an opportunity to use his computer skills to assist a children's organization with transcribing, compiling statistics, re-creating documents and disassembling hardware; another obtained employment and developed natural supports on the job; the third has

been stable at his job for over 2 ½ years. All of the individuals are tremendously valued by their employers and co-workers and have filled important roles in their community.

#### **i. HEALTH and SAFETY**

Due to the nature of the service, Montana Works staff do not assist with medications. There are no "sites" other than community employers, who need to meet State and Local safety requirements. Montana Works does not provide transportation services.

#### **ii. SERVICE PLANNING AND DELIVERY**

As described above in the accomplishments section, the individuals who work with Montana Works continue to be very successful at their work sites and have chosen where they work. Careful planning and collaboration provided individuals with job flexibility, successful matching of job and talents, and most ideal worksite environments. Individual Plans and Quarterly Status reports are complete and thorough.

Concerns noted during review were measurability of the wording of objectives and tracking. However, objectives and tracking are being done to individual's satisfaction and progress being shown. Also, the need for an intake assessment completed for an individual receiving supports. See QAOS # 1.

In cases where Montana Works provides employment services and the individual also accesses Residential Supports with Ravalli Services, Montana Works staff continues to ensure that communication between service providers is open and that the individuals' health needs are met.

As noted in the previous Quality Assurance report (FY '06), Montana Works staff provide exemplary individualized services. They uphold the ideals of dignity, respect, and individual choice. All interactions are driven by these ideals and this is evidenced by the success and satisfaction the individuals display.

#### **iii. STAFFING**

Since the last review there has been no turnover in direct service staff. Susanne's continued tenure has been of great assistance to continuity of services. She has been working on the details on becoming independent from the Rural Institute which has involved a large amount of leg work and paper work to make this happen. She has developed strong relationships with the individuals she supports and the members of their teams. She knows and understands their dreams, the direction they are moving and how to support them in working thru issues in order to achieve their dreams. She has completed the Staff Survey in the past without exception. Her demonstrated performance is consistent with Mandatory Reporting, incident Reporting, and Emotionally Responsible Caregiving.

#### **iv. INCIDENT MANAGEMENT**

There have been no concerns with Incident Management. Due to the nature of employment-only services and the status of the consumer's long-term stability at their jobs, occurrence of incidents would be uncommon.

Susanne is diligent about communication with the Adult Protective Services staff, case management staff, and the DDP staff. In cases where questionable circumstances arise, she will call any/all of the above to ensure the consumer's safety. There have been no critical or reportable incidents during the period of this review.

**D. Transportation**

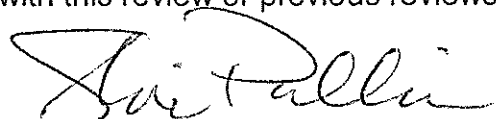
N/A

**E. Case Management**

N/A

**CONCLUSION**

Montana Works provides exemplary employment services. As noted in previous reviews, the DDP is hopeful they will expand their services. There are no open findings with this review or previous reviews.



Sheri Pullium  
Quality Improvement Specialist  
Developmental Disabilities Program

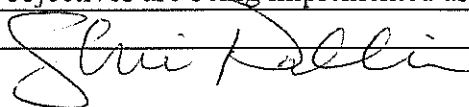
Cc: Susanne Miekle, Montana Works  
Paula Miskuly-Tripp, DDP Regional Manager (Missoula)  
Tim Plaska, DDP Community Services Bureau Chief (Helena)  
John Zeeck, DDP Quality Assurance Specialist (Helena)  
Perry Jones, DDP HCBS Waiver Specialist (Helena)

Note – Attach all supporting documentation.

STATE OF MONTANA  
Department of Public Health and Human Services  
Developmental Disabilities Program

Quality Assurance Observation Sheet No:1

DDP QAOS FORM 2007			
	<input type="checkbox"/> Routine <input checked="" type="checkbox"/> Quality Assurance review <input checked="" type="checkbox"/> Plan of Correction needed		
Provider:	Montana Works	QIS:	Sheri Pullium
Date:	4/4/07	Concern:	a)All of individuals needs or dreams not realized b)Unable to assure progress on a goal c)Intent of Individual's goal not being tracked

DDP QAOS FORM 2007		
Observation:	QA of documentation found: a) Lack of initial assessments b)Goal Objectives not measurable c)Tracking does not match objectives.	
Criterion:	ARM37.34.1101 et seq.	
Effect:	a)IP document unable to assure objectives meet needs and dreams of individual, b)that objectives are realistic, c)that objectives are being implemented as intended.	
QIS Signature:		Due date: <i>10 days from day received</i>

PROVIDER RESPONSE	
Cause (why did it occur):	
Action (what will be done):	
Signed by:	Date:

DDP	
Disposition: <input type="checkbox"/> Accepted <input type="checkbox"/> Requesting further review [response date: _____]	
Copy to (check all that apply): <input checked="" type="checkbox"/> Regional Manager <input checked="" type="checkbox"/> Executive Director <input checked="" type="checkbox"/> DDP Bureau Chief <input checked="" type="checkbox"/> Contact File <input checked="" type="checkbox"/> Quality Assurance Specialist <input type="checkbox"/> President, Board of Directors <input checked="" type="checkbox"/> Other (Specify: Susanne Mickle )	

Comments:

Note – Attach all supporting documentation.

STATE OF MONTANA  
Department of Public Health and Human Services  
Developmental Disabilities Program  
Quality Assurance Observation Sheet    No:2

<b>DDP QUALITY ASSURANCE</b>			
	<input type="checkbox"/> Routine <input checked="" type="checkbox"/> Quality Assurance review <input type="checkbox"/> Plan of Correction needed		
Provider:	Montana Works	QIS:	Sheri Pullium
Date:	4/4/07	Concern:	Commendation

<b>DDP OBSERVATION</b>		
Observation:	It should be recognized that a large amount of investment has been made by MTW staff to know and understand the individual's skills and passions that she supports. Ex: One of the individuals was unhappy in a job that he worked at that was evident in his mood and demeanor. Currently he has changed jobs and now "lights up" when he goes to work and talks about his job.	
Criterion:		
Effect:	Increased quality of life and fulfilling Identity Outcomes "People choose where they work and People are satisfied with their personal situations."	
QIS Signature:	<i>Sheri Pullium</i>	Due date: N/A

<b>PROVIDER RESPONSE</b>		
Cause (why did it occur):		
Action (what will be done):		
Signed by:		Date:

<b>DDP DISPOSITION</b>	
Disposition: <input type="checkbox"/> Accepted <input type="checkbox"/> Requesting further review [response date:       ]	
Copy to (check all that apply): <input type="checkbox"/> Regional Manager <input type="checkbox"/> Executive Director <input checked="" type="checkbox"/> DDP Bureau Chief	
<input checked="" type="checkbox"/> Contact File <input checked="" type="checkbox"/> Quality Assurance Specialist <input type="checkbox"/> President, Board of Directors	
<input checked="" type="checkbox"/> Other (Specify: <i>Suzanne Mielke</i> )	

Comments:

Note – Attach all supporting documentation.

RECEIVED

APR 16 2007

STATE OF MONTANA  
Department of Public Health and Human Services  
Developmental Disabilities Program  
Quality Assurance Observation Sheet No:1

REGION V DDP

	<input type="checkbox"/> Routine <input checked="" type="checkbox"/> Quality Assurance review <input checked="" type="checkbox"/> Plan of Correction needed		
Provider:	Montana Works	QIS:	Sheri Pullium
Date:	4/4/07	Concern:	a) All of individual's needs or dreams not realized b) Unable to assure progress on a goal c) Intent of Individual's goal not being tracked

Observation:	QA of documentation found: a) Lack of initial assessments b) Goal Objectives not measurable c) Tracking does not match objectives.	
Criterion:	ARM37.34.1101 et seq.	
Effect:	a) IP document unable to assure objectives meet needs and dreams of individual, b) that objectives are realistic, c) that objectives are being implemented as intended.	
QIS Signature:	<i>Sheri Pullium</i>	Due date:

10 days from day received

Cause (why did it occur):	a) Oversight on documentation/assessment b) Additional training needed.	
Action (what will be done):	a) Assessment completed with individual 4/11/07 b+c) Will attend 07 Person Centered Planning training and verify IP goals with QIS.	
Signed by:	<i>[Signature]</i>	Date: 4/11/07

DDP
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Disposition: ☐ Accepted ☐ Requesting further review [response date: \_\_\_\_\_]  
Copy to (check all that apply): ☒ Regional Manager ☒ Executive Director ☒ DDP Bureau Chief  
☒ Contact File ☒ Quality Assurance Specialist ☐ President, Board of Directors  
☒ Other (Specify: Susanne Mickle)

Comments: